PJ Enterprises Scope Management Plan
April 12, 2020

Customer Success Advocates Training and Job Aids Project

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Introduction

The Scope Management Plan provides the scope framework for this project. This plan documents the scope management approach; roles and responsibilities as they pertain to project scope; scope definition; verification and control measures; scope change control; and the project's work breakdown structure. Any project communication which pertains to the project's scope should adhere to the Scope Management Plan.

The purpose of this project is to increase customer and telephone operator satisfaction through training and employee incentive programs. The project team will design and develop a training program and supplemental materials to incentivize and support telephone operators and their supervisors. This training will enable PJ Enterprises to meet a customer service goal of 10% improvement in customer satisfaction scores, allow for aggressive sales growth, and increase employee satisfaction and retention.

A graphic designer and a printer for the design and printing of the job aid(s), in addition the metrics from the phone company vendor are additional external resources or outsourcing that are needed for completion of this project:

Scope Management Approach

For this project, scope management will be the sole responsibility of the Project Manager. The scope for this project is defined by the Scope Statement and the Work Breakdown Structure. The Project Manager, Sponsor, Owner, and Stakeholders will establish and approve documentation for measuring project scope which includes deliverable quality checklists and work performance measurements. Proposed scope changes may be initiated by the Project Manager, Project Owner, Stakeholders or any member of the project team. All change requests will be submitted to the Project Manager who will then evaluate the requested scope change. Upon acceptance of the scope change request the Project Manager will submit the scope change request to the Project Sponsor and Owner for acceptance. Upon approval of scope changes by the Project Sponsor and Owner, the Project Manager will update all project documents and communicate the scope change to all stakeholders. Based on feedback and input from the Project Manager and Stakeholders, the Project Sponsor and Owner are responsible for the acceptance of the final project deliverables and project scope.

Roles and Responsibilities

The Project Manager, Sponsor and team will all play key roles in managing the scope of this project. As such, the Project Sponsor, Project Manager, and team members must be aware of their responsibilities in order to ensure that work performed on the project is within the established scope throughout the entire duration of the project. The table below defines the roles and responsibilities for the scope management of this project.

Name	Role	Responsibilities
PJ Enterprises Team		
Jane Smith	Sponsor	● Approve or deny scope change requests as appropriate ● Evaluate need for scope change requests ● Accept project deliverables
John Doe	Project Manager	● Measure and verify project scope ● Facilitate scope change requests ● Facilitate impact assessments of scope change requests ● Organize and facilitate scheduled change control meetings ● Communicate outcomes of scope change requests ● Update project documents upon approval of all scope changes
Sheena Perez (SME) *Merchandising Manager*	Team Member	● Participate in defining change resolutions ● Evaluate the need for scope changes and communicate them to the project manager as necessary
Judie Thompson (SME) *Catalogs Director*	Team Member	● Participate in defining change resolutions ● Evaluate the need for scope changes and communicate them to the project manager as necessary.
Team 2 Consulting Team		
Maria Bagshaw	Project Manager	● Manage timeline, milestones and budget with PJ enterprises team and client communications.
Patti Courtney	Instructional Designer	● Design ILT instructional content, training and associated materials.
Dawn Needham	Instructional Designer	● Design job aids and write scripts for scenarios.
Amy Koshoshek-Winkler	Technical Writer	● Write scripts for scenarios. Write facilitator guide.

Table 1.1, ***Scope Management Roles and Responsibilities***

Scope Definition

The project description and deliverables were developed based on the GAP analysis collection process and input from PJ Enterprises management and subject matter experts. This process of expert judgment provided feedback on the most effective ways to meet the original business objectives listed below:

- Focus on quality and customer service with a minimum of 10 percent improvement on customer-service scores.
- Decrease customer service complaints.
- Increase telephone operator response times from 3 to 6 per hour.
- Focus on quality of work environment and staff development and recognition.
- Increase capacity via the call system to within the 90% capacity range to enable telephone operators to reach their goals.
- Decrease disproportionate turnover.

While conducting the comprehensive GAP analysis process as outlined in the project charter, we will use the following methods to collect the needed information, metrics/reports and documentation:

- Anonymous Surveys: Customer service supervisors and telephone operators.
- Interviews: Conducted with management, customer service supervisors and telephone operators
- Observation: Customer service supervisors and telephone operators will be observed.
- Documents and data: Existing data and data from the needs assessment will be collected and analyzed.

Upon completion of the GAP analysis, we determined the requirements for developing and delivering a new training program for the telephone operators that improves customer service and sales skills. In addition to the training, it was determined to design and develop an employee incentive program that will help meet employee satisfaction and engagement.

Project Scope Statement

The project scope statement provides a detailed description of the project, deliverables, constraints, exclusions, assumptions, and acceptance criteria. Additionally, the scope statement includes what work should not be performed in order to eliminate any implied but unnecessary work which falls outside the of the project's scope.

In Scope

This project includes the following items that are considered in scope for this project:

- Face-to-face or virtual instructor-led training that allows for role playing for the telephone operators as customers in order to improve customer service scores.
- Online job aid or product resource guide and/or template designed for consistency of product information so operators can find product information easier.
- The development of an employee incentive program.

Out of Scope

The following areas and item are considered out of scope for this project:

- Any type of new hire orientation
- Any training materials not specified above (supervisors or management, etc.)
- LMS or other training system beyond current existing conditions
- Technology and/or software upgrades that house the catalogs.

Acceptance Criteria

The project will be considered complete based on the following acceptance criteria:

- Review the project with the team to ensure all project tasks are showing 100% complete.
- Confirm completeness with the team. The team should collaborate at this time to see if something was discussed or promised to someone but wasn't delivered yet and make it right.
- Interview the customer to make sure they accept the project as complete. Review project invoices to make sure everything has been paid. Any outstanding invoices should be discussed at this time. Having a project checklist to present at this time reiterates the work that was done in relation to this project.
- The last step is to obtain official customer signoff showing their acceptance that the project is complete. Stakeholders should be included in this communication, so they know that PJ Enterprises is happy with the solution.

Project Deliverables

The following items will be delivered for this project:

- Face-to-face or virtual instructor-led training that allows for role playing for the telephone operators as customers in order to improve customer service scores.
- Online job aid or product resource guide and/or template designed for consistency of product information so operators can find product information easier.
- The development of an employee incentive program.

Assumptions and Constraints

The assumptions and constraints are listed below:

Assumptions

- Content from catalogs (that is used in training) is supplied by PJ Enterprises.
- All telephone operator employees will be required to go through the training.
- There will be appropriate telephone coverage for telephone operator employees while they are engaged in ILT training.
- Telephone operator employees will be compensated for time spent training.
- The Human Resources department of PJ Enterprises will schedule and communicate training.
- The Human Resources department of PJ Enterprises will collaborate with managers on employee incentives/initiatives.

Constraints

- The need of additional staff to cover the phone operators while training.
- All training must be ADA 508 compliant.
- Project is dependent on a technology upgrade for both software and hardware.
- An unplanned change in the scope, resulting in increased time, resources and delivery timeline.

Additionally, the project is not to exceed four months in duration or $400,000 in spending. Assumptions for this project are that support will be provided by the Project Sponsor and all department managers and adequate internal resources are available for the successful completion of this project.

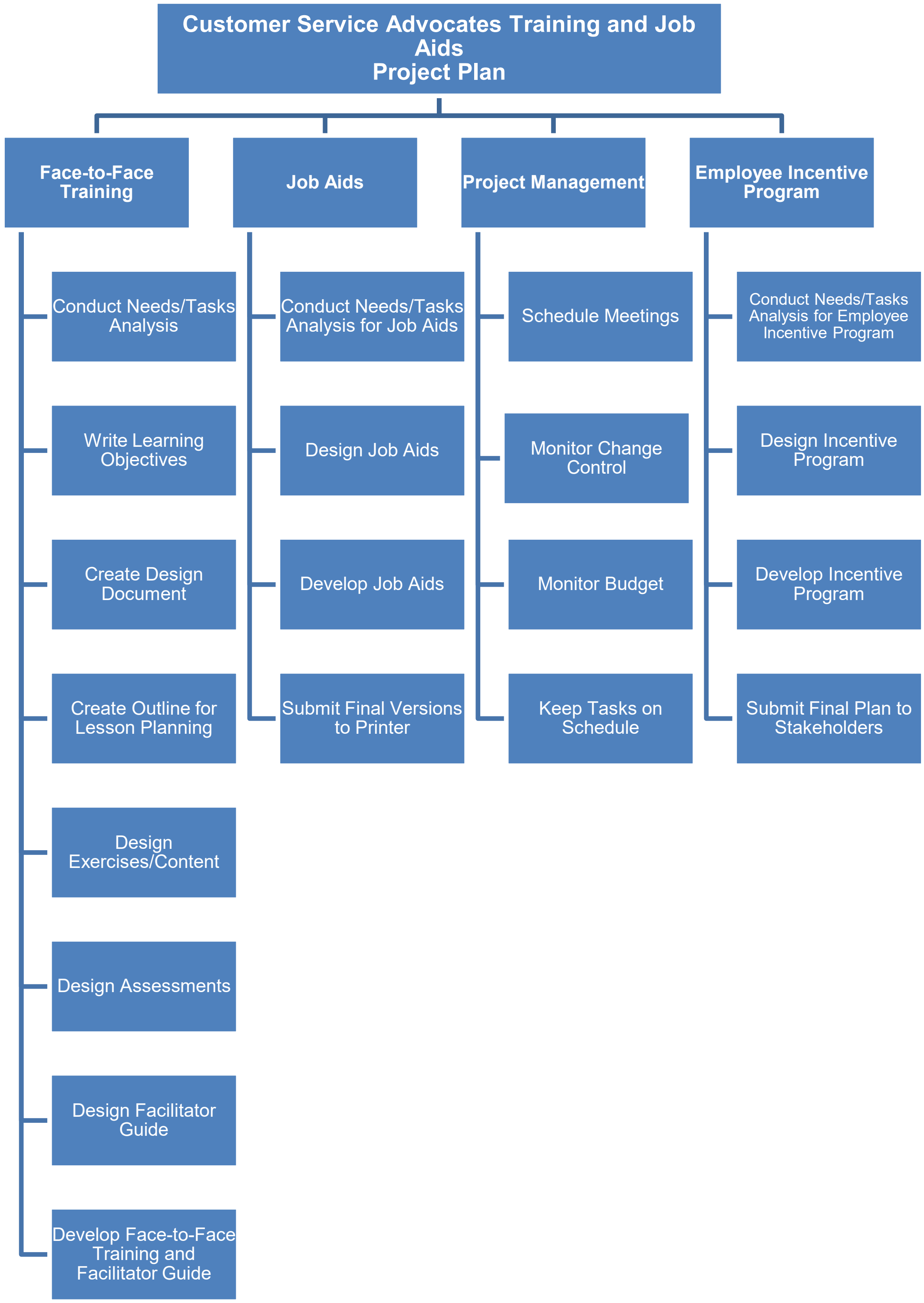
Work Breakdown Structure

In order to effectively manage the work required to complete this project, it will be subdivided into individual work packages which will not exceed a total of 430 hours of work (see Project Charter for approximate breakdown of hours.) This will allow the Project Manager to more effectively manage the project's scope as the project team works on the tasks necessary for project completion. The project is broken down into three deliverables and Project Management monitoring and management the workflow :

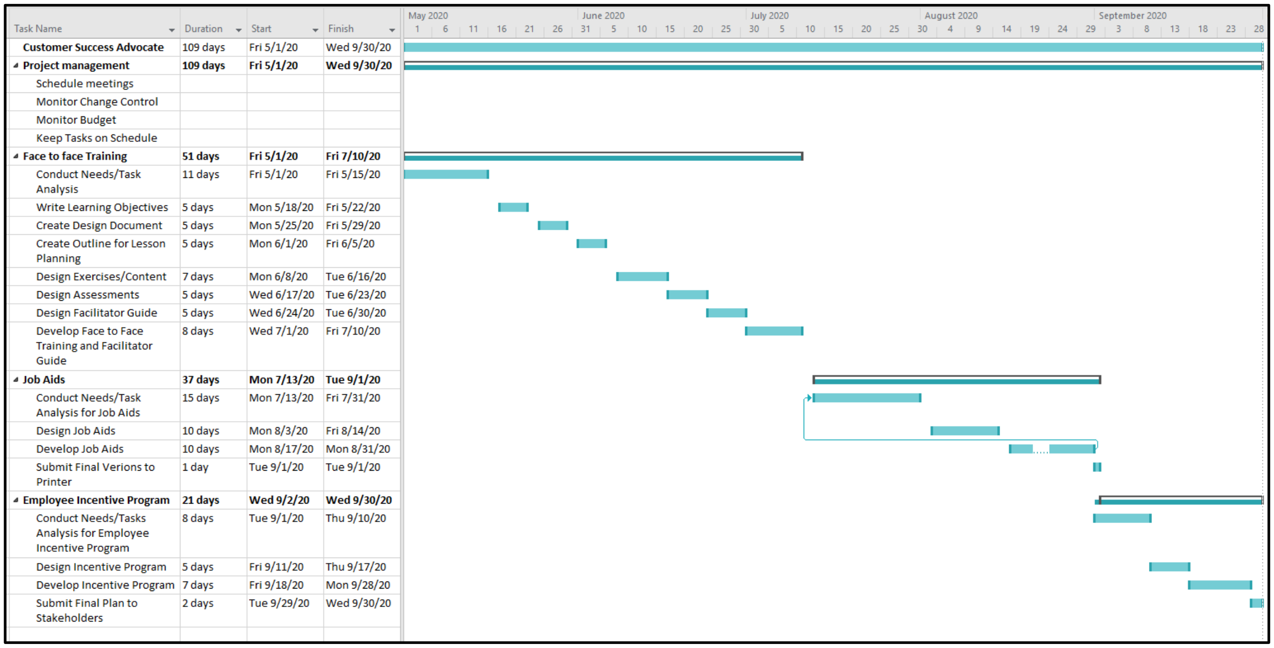
- Face-to-Face Training
- Job Aids
- Employee Incentive Program
- Project Management

Each of the deliverables is then subdivided further down to work package/tasks which will require no more than 70 hours of work and no less than 4 hours of work (see WBS structure below).

Work Breakdown Structure Workflow



Schedule and Gantt Chart



Task Name	Duration	Start	Finish
Customer Success Advocate	109 days	Fri 5/1/20	Wed 9/30/20
Project management	**109 days**	**Fri 5/1/20**	**Wed 9/30/20**
Schedule meetings			
Monitor Change Control			
Monitor Budget			
Keep Tasks on Schedule			
Face to face Training	**51 days**	**Fri 5/1/20**	**Fri 7/10/20**
Conduct Needs/Task Analysis	11 days	Fri 5/1/20	Fri 5/15/20
Write Learning Objectives	5 days	Mon 5/18/20	Fri 5/22/20
Create Design Document	5 days	Mon 5/25/20	Fri 5/29/20
Create Outline for Lesson Planning	5 days	Mon 6/1/20	Fri 6/5/20
Design Exercises/Content	7 days	Mon 6/8/20	Tue 6/16/20
Design Assessments	5 days	Wed 6/17/20	Tue 6/23/20
Design Facilitator Guide	5 days	Wed 6/24/20	Tue 6/30/20
Develop Face to Face Training and Facilitator Guide	8 days	Wed 7/1/20	Fri 7/10/20
Job Aids	**37 days**	**Mon 7/13/20**	**Tue 9/1/20**
Conduct Needs/Task Analysis for Job Aids	15 days	Mon 7/13/20	Fri 7/31/20
Design Job Aids	10 days	Mon 8/3/20	Fri 8/14/20
Develop Job Aids	10 days	Mon 8/17/20	Mon 8/31/20
Submit Final Verions to Printer	1 day	Tue 9/1/20	Tue 9/1/20
Employee Incentive Program	**21 days**	**Wed 9/2/20**	**Wed 9/30/20**
Conduct Needs/Tasks Analysis for Employee Incentive Program	8 days	Tue 9/1/20	Thu 9/10/20
Design Incentive Program	5 days	Fri 9/11/20	Thu 9/17/20
Develop Incentive Program	7 days	Fri 9/18/20	Mon 9/28/20
Submit Final Plan to Stakeholders	2 days	Tue 9/29/20	Wed 9/30/20

Communications Matrix

The following table identifies the communications requirements for this project.

Communication Type	Objective of Communication	Medium	Frequency	Audience	Owner	Deliverable	Format
Kickoff Meeting	Introduce the project team and the project. Review project objectives and management approach. Discuss any concerns in open forum.	• Face to Face	Once	• Project Sponsor • Project Consulting Team • PJ Enterprises Project Team • Stakeholders	Project Manager	• Agenda • Meeting Minutes	Internal Project Website; Shared GoogleDocs
Project Team Meetings	Review status of the project with the team.	• Conference Call	Weekly	• Project Team	Project Manager	• Agenda • Meeting Minutes • Project schedule updates • Budget projection updates	Internal Project Website; Shared GoogleDocs/Drive
Instructional Design meetings	Discuss and develop technical and instructional design solutions for the project.	• Face to Face • Email as needed	Bi-Weekly or as needed	• Project Technical Staff, including Instructional Designers • SMEs as needed	Lead Instructional Designer	• Agenda • Meeting Minutes	Internal Project Website; Shared GoogleDocs
Monthly Project Status Meetings	Report on the status of the project to management.	• Email summary before call • Conference Call	Monthly	• Project Owner • Project Consulting Team • PJ Enterprises Project Team	Project Manager	• Summary updates • Project schedule • Budget projection updates • Milestones met	Internal Project Website; Shared GoogleDocs/Drive
Project Status Reports	Report the status of the project including activities, progress, costs and issues. Discuss progress of milestones.	• Email • Conference call as needed for follow up or as requested	Monthly	• Project Sponsor • Project Team • Stakeholders	Project Manager	• Project Status Report • Project schedule • Milestones met or changed	Internal Project Website; Shared GoogleDocs/Drive

Communication Escalation Process:

Efficient and timely communication is the key to successful project completion. As such, it is imperative that any disputes, conflicts, or discrepancies regarding project communications are resolved in a way that is conducive to maintaining the project schedule, ensuring the correct communications are distributed, and preventing any ongoing difficulties. In order to ensure projects stay on schedule and issues are resolved, our consultants will use its standard escalation model to provide a framework for escalating communication issues. The table below defines the priority levels, decision authorities, and timeframes for resolution.

Priority	Definition	Decision Authority	Timeframe for Resolution
Priority 1	Major impact to project or business operations. If not resolved quickly there will be a significant adverse impact to revenue and/or schedule.	Project Sponsor or higher	Within 4 hours
Priority 2	Medium impact to project or business operations which may result in some adverse impact to revenue and/or schedule.	Project Sponsor & Project Owner	Within one business day
Priority 3	Slight impact which may cause some minor scheduling difficulties with the project but no impact to business operations or revenue.	Project Manager & Project Owner	Within two business days
Priority 4	Insignificant impact to project but there may be a better solution.	Project Manager	Work continues and any recommendations are submitted via the project change control process

** NOTE: Any communication including sensitive and/or confidential information will require escalation to Project Sponsor or higher for approval prior to external distribution.

Scope Verification

As this project advances, the Project Manager will verify the project deliverables against the original scope as defined in the scope statement and the WBS. The deliverables as outlined in the scope of this project include:

- Face-to-face or virtual instructor-led training that allows for role playing for the telephone operators as customers in order to improve customer service scores.
- Job aids or product resource guide and/or template designed for consistency of product information so operators can find product information easier.
- The development of an employee incentive program.

Steps involved in the verification process include the following:

1. The Project Manager will verify that the scope meets the requirements and expectations as defined in the project plan.
2. After they are verified, the Project Manager and Sponsor will meet for formal acceptance of the deliverable(s).
3. After acceptance of the deliverables John Doe the Project Manager and Jane Smith the Project Sponsor will sign the Project Deliverable Acceptance document (see the Acceptance document). This will confirm that project work remains within the scope of the project on a consistent basis throughout the lifecycle of the project.

Acceptance Document

The purpose of this acceptance document is to certify that the requirements and expectations of the deliverable(s) are met, approved, and accepted. This document can be used during each phase of the project or at the end of the project as each deliverable is established.

- The project team will perform checks to verify if the deliverable is acceptable.
- The client will go through a series of steps before accepting the deliverable for each phase or lifecycle of the project.

Revision History			
Date	**Version**	**Author(s)**	**Notes**

PROJECT		
Date Deliverable Submitted:	**Project Name:**	**Project # (if applicable):**
Project Manager:	**Sponsor:**	
Completed By (Name of person/s and title submitting deliverable for acceptance):		

Deliverable
Deliverable Name:
Acceptance Criteria:

CONDITIONAL ACCEPTANCE	
All persons agree that the Customer Service Advocates satisfactorily completed and delivered the deliverable described. The Project Manager and Sponsor accept this deliverable, with the following documented exceptions if applicable.	
Change/Issue Log #	**Title/Description**

Approvals			
Role	**Name & Title**	**Signature**	**Date**
Project Manager			
Project Sponsor			

Scope Control

The foundation for the project is laid out and documented in the scope where we have defined our processes and deliverables for sponsor acceptance. The WBS has been created so we can manage the project according to the plan documentation. If a change were to occur to the scope the following change process is to be followed to protect the project manager, the organization and the expectations of the stakeholders involved.

1. A change is requested via the Change Request Form. The form must be completed with the following information:
    - Requestors name
    - What lesson and lesson number is it affecting?
    - What phase of the project?
    - What will this change affect?
    - Describe the change
    - Describe the reason for the change
    - Were there alternatives considered?
    - Any technical changes needed?
    - Are there risks?
    - Is there an increase in resources and/or costs?
    - Implications to quality of the project?
    - Are there alternatives or recommendations
2. An initial review is conducted by the Project Manager and the teams/people affected by the change.
3. An impact analysis is conducted.
4. The change is Approved, Rejected, or Deferred by the Project Manager and Project Sponsor.

If the scope change request is approved, the changes need to be added to the project to ensure the change is implemented. The budget and project charter should be updated/revised to reflect the changes. All changes should be communicated to the team members and stakeholders through a Scope Change Log report and/or email.

Change Request Form

<table>
<tr><td colspan="2">PJ Enterprises – Customer Service Advocates Project Change Request</td></tr>
<tr><td colspan="2">Topic:</td></tr>
<tr><td>Lesson#:</td><td>Date:</td></tr>
<tr><td colspan="2">Phase:
☐Analysis ☐ Design ☐ Develop ☐Implement ☐ Evaluate</td></tr>
<tr><td>Change Requestor:</td><td>Change Request:</td></tr>
<tr><td colspan="2">Change Category (Check all that apply):</td></tr>
<tr><td colspan="2">☐Schedule ☐Cost ☐Scope ☐Resources
☐Testing/Quality ☐ILT/CBT ☐Requirements/Deliverables</td></tr>
<tr><td colspan="2">Does this Change Affect (Check all that apply)?
☐Training ☐Data Collection ☐Contract/SOW
☐Deliverables/Job Aids ☐Other</td></tr>
<tr><td colspan="2">Describe the Change Being Requested:</td></tr>
<tr><td colspan="2">Describe the Reason for the Change:</td></tr>
<tr><td colspan="2">Describe all Alternatives Considered:</td></tr>
<tr><td colspan="2">Describe any (Possible) Technical Changes Required to Implement this Change:</td></tr>
<tr><td colspan="2">Describe any Risks to be Considered for this Change:</td></tr>
<tr><td colspan="2">Estimated Resources and Costs needed to Implement this Change:</td></tr>
<tr><td colspan="2">Describe any Implications to Quality:</td></tr>
<tr><td colspan="2">Alternatives and Recommendation:</td></tr>
<tr><td colspan="2">Disposition:
☐Approve ☐Reject ☐Defer</td></tr>
<tr><td colspan="2">Justification of Approval, Rejection, or Deferral:</td></tr>
</table>

Accepted:		
Name	**Signature**	**Date**
Approved:		
Name	**Signature**	**Date**

Sponsor Acceptance

Approved by the Project Sponsor:

Jane Smith Project Sponsor	Date